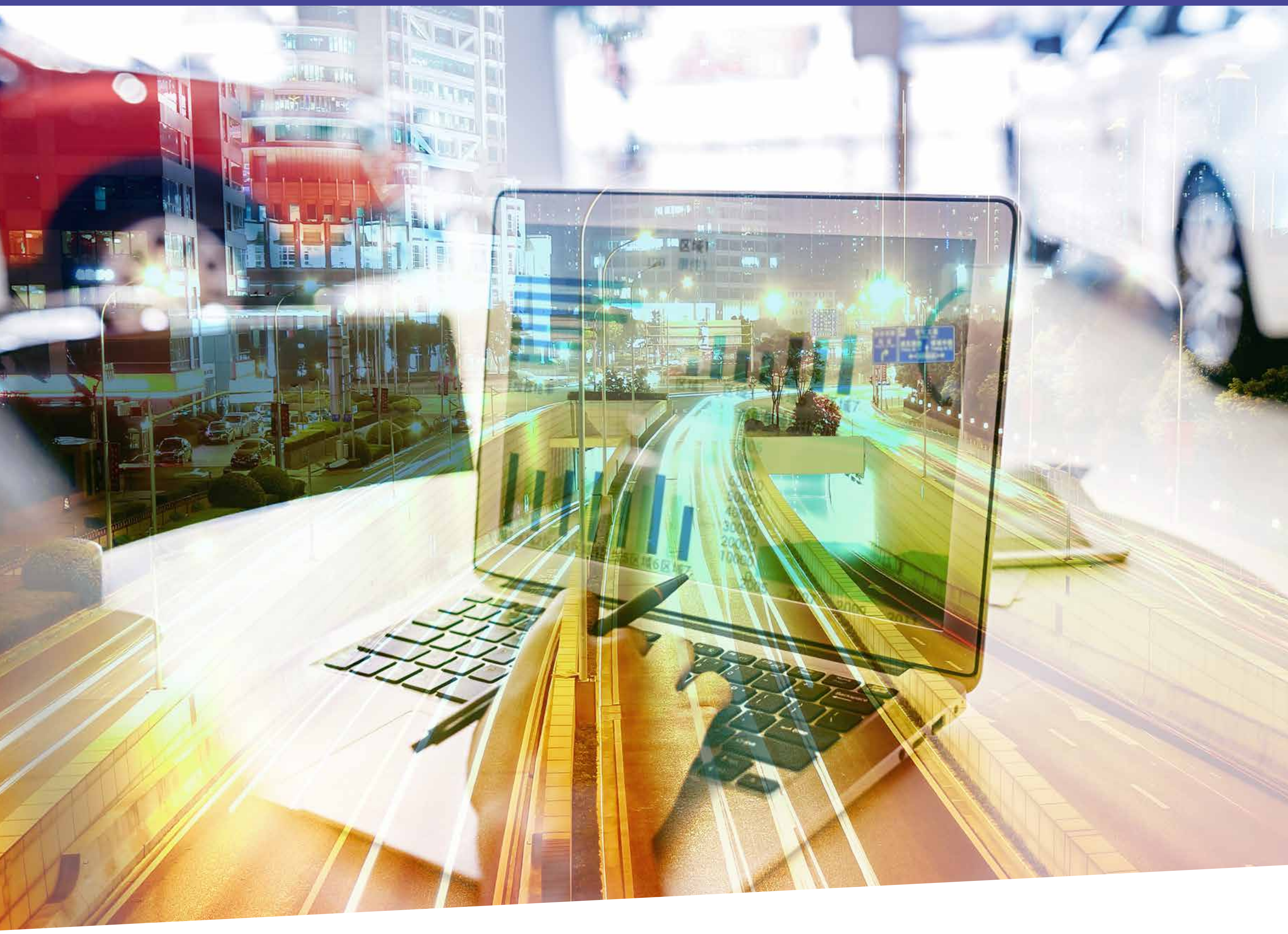
www.topmotive.eu



AFTERMARKET REPORT **2022-2024**

March 2025

// CONTENTS

// ABOUT US

Since 1994, our world is spinning around information systems as well as services for the Automotive Market. In this area, we are Europe’s market leader and rely on our team of more than 350 automotive and IT experts. With nine subsidiaries, our TOPMOTIVE Group is represented at eight locations in four countries. From the very beginning until today, we set examples with our innovations at the market. We pursue the goal to keep our customers up to date with path-breaking products and services. And the most important thing: we never stop learning. We use the knowledge, data and facts from our information systems and apply them in a targeted manner to drive the products even further. We analyze and evaluate – and draw the right conclusions for our customers. Find out in this analysis report what these learnings are about and how you can make use of them in your daily business.

// DATA BASIS FOR THIS REPORT

The last AM report dates back to 2021, so in this report, we will cover the years 2022–2024 and commit to improving with a regular report starting next year.

OUR DATA BASIS

Our information systems are used in several European countries for identifying and ordering spare parts. We collect the usage data which provides the basis for the following analysis. Since our company is based in Germany, we have historically a strong customer basis in the DACH region counting over 200.000 touch points per day. Therefore, the following analysis is based on our usage data from Germany, Austria and Switzerland.

Spare parts identification in our information systems can be achieved through a direct product search or a prior vehicle selection. Selecting a vehicle provides an easy way for our users to find the right product without knowing the specific product number. The number of vehicle selections are used to analyze car manufactures and compare between different car models in the following report.

DISCLAIMER

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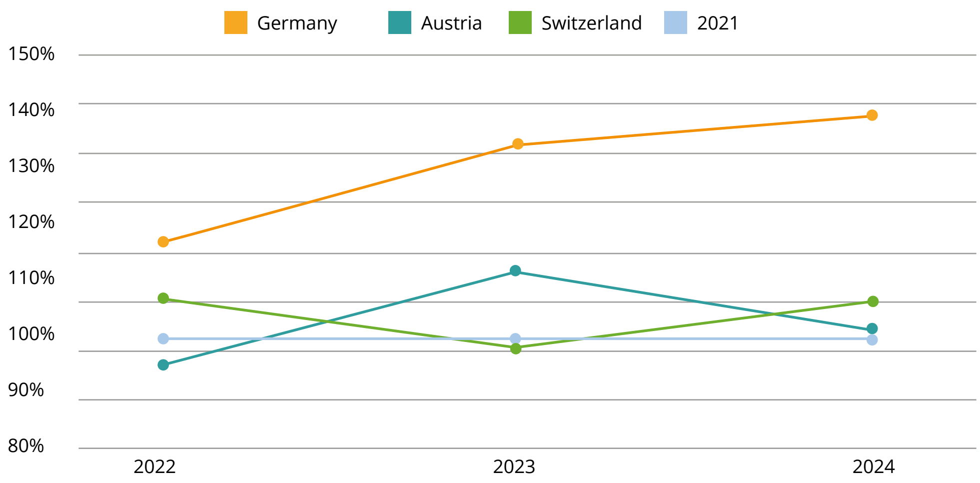
1.

// AFTERMARKET OVERVIEW: DACH 2022 – 2024

1.1 PARTS DEMAND



Germany shows a steady increase in demand from 2022 to 2024. The trend shows a continuous growth in the need for spare parts.

Austria exhibits a fluctuating trend. The demand peaked in 2023 before decreasing again in 2024.

Switzerland also demonstrates a fluctuating trend. The demand declined from 2022 to 2023, then rose again in 2024. Throughout the years, demand remained at a high level.

1.

// AFTERMARKET OVERVIEW: DACH 2022 – 2024

1.2 BRANDS

From 2022 to 2024, there were some notable changes in the ranking of brands in our shopping basket. **Bosch** remained the leading brand, steadily increasing its share from **11,81 % in 2022** to 12.15 % in **2024**, peaking at **12,22 % in 2023**. **Mahle** also showed continuous growth, rising from **6,6 % in 2022** to **6,65 % in 2024**, despite a slight dip in 2023. **MANN-FILTER** followed a similar trend, increasing from **5,74 % in 2022** to **6,34 % in 2024.**

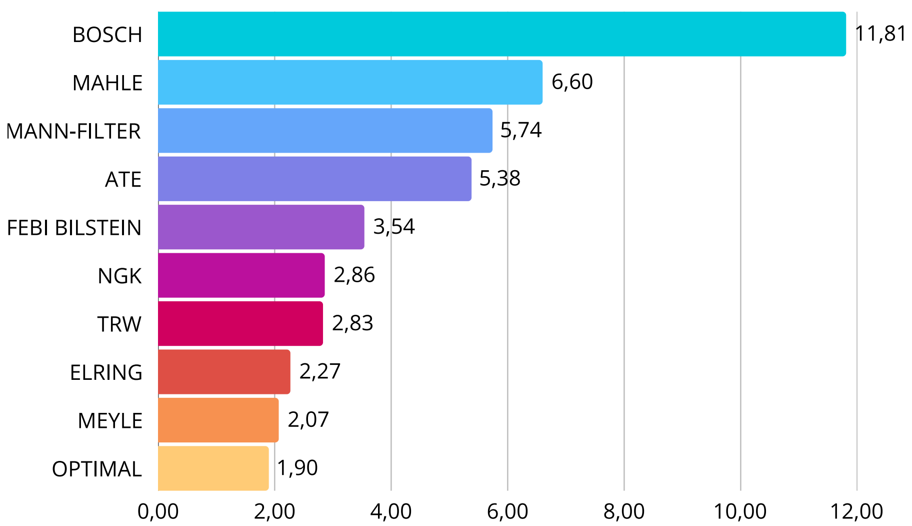
ATE remained relatively stable, fluctuating slightly from **5,38 % in 2022** to **5,25 % in 2024**. Febi Bilstein saw steady growth from **3,54 % in 2022** to **3,78 % in 2024**. **NGK and TRW**, which were originally in the middle of the ranking, evolved differently: **NGK declined slightly from 2,86 % in 2022 to 2,26 % in 2024,** while **TRW remained stable between 2,67 % and 2,92 %.**

Optimal, grew from **1,9 %** in 2022 to **2,72 %** by 2024. **Elring and Meyle** recorded slight increases but remained at the lower end of the ranking.

Overall, the biggest winners were **Bosch, Mahle, and MANN-FILTER**, while **NGK** experienced a gradual decline. The climbing of **Optimal** into the ranking indicates a shift in product preferences over the years.

Disclaimer: NGK has split the feed numbers, which is one reason for the ranking decline.

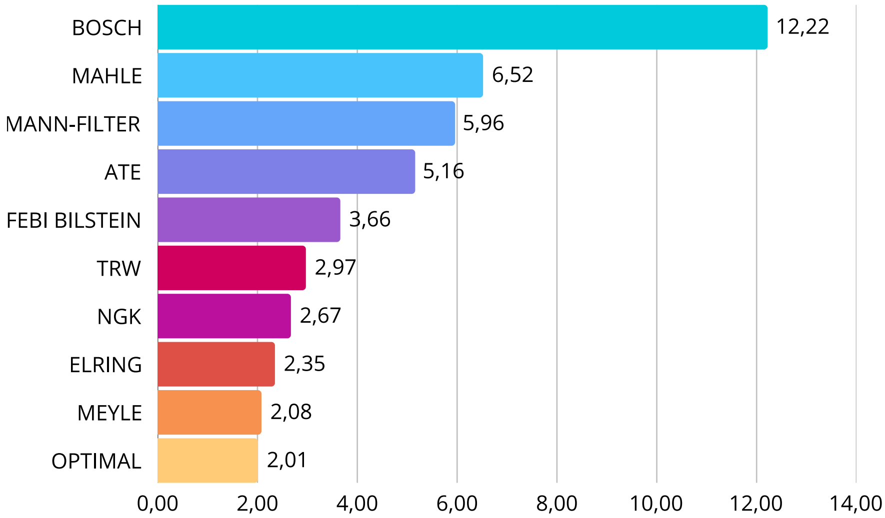
2022



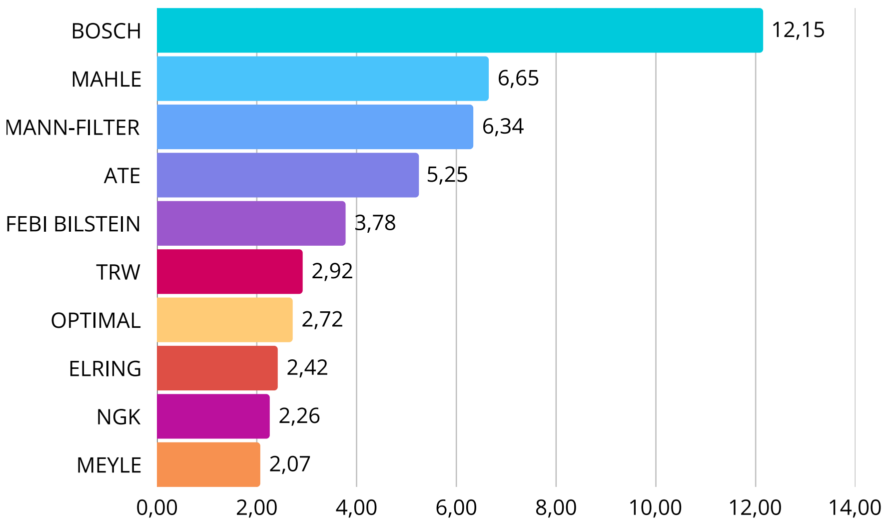
1.

1.2 BRANDS

2023



2024



1.

// AFTERMARKET OVERVIEW: DACH 2022 – 2024

1.3 PRODUCT GROUPS

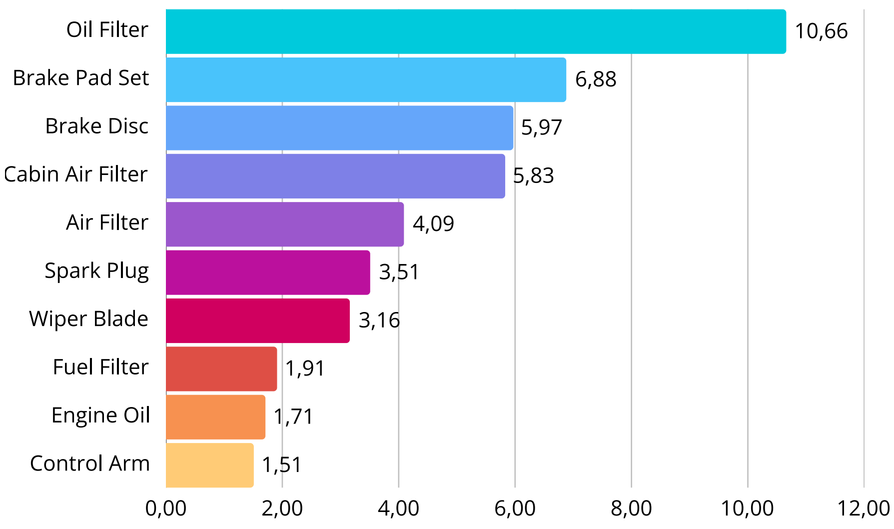
From 2022 to 2024, the ranking of the most popular products in our system has remained relatively stable, with the **Oil Filter** consistently being the top-selling product. The **Brake Pad Set** and **Brake Disc** have also maintained their strong positions, with minor fluctuations in their exact values.

One notable change is the **Cabin Air Filter**, which has slightly increased in ranking over the years. The **Air Filter** has remained stable, while the **Spark Plug** has shown some decline, particularly in 2024, where it was surpassed by **Wiper Blades** in popularity.

New entries like **Control Arm** appeared in 2022 and remained in 2023 and 2024, replacing previous lower-ranked items such as the **V-Ribbed Belt** (which disappeared after 2021). The **Fuel Filter** and **Engine Oil** have consistently stayed in the lower rankings, with slight fluctuations in their values.

Overall, while the top-ranked products have remained largely unchanged, minor shifts and new entries indicate evolving consumer preferences and market trends.

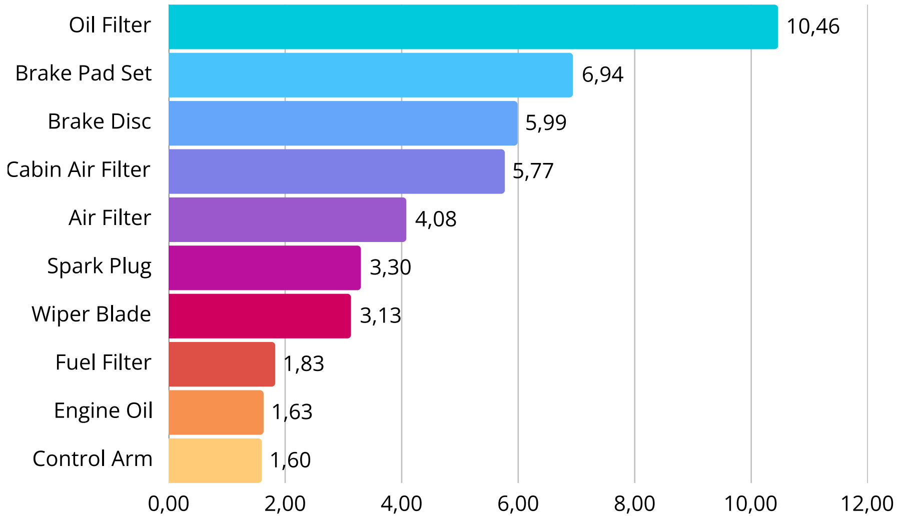
2022



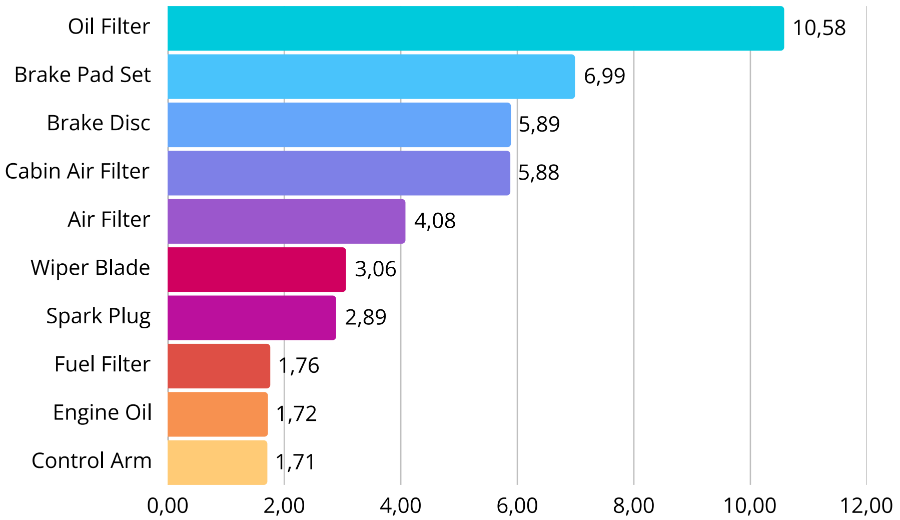
1.

1.3 PRODUCT GROUPS

2023



2024



1.

// AFTERMARKET OVERVIEW: DACH 2022 – 2024

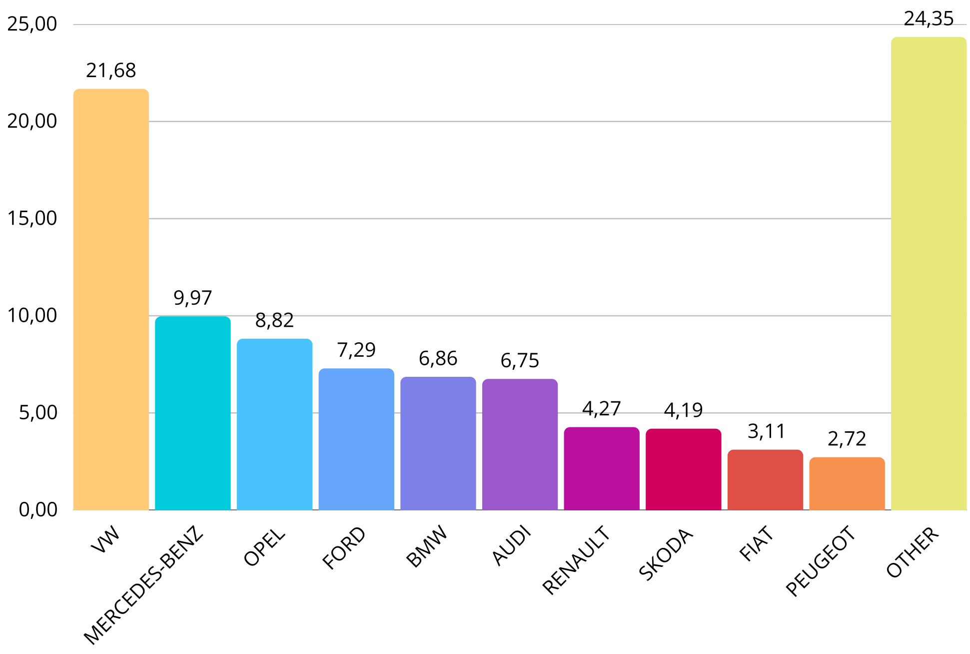
1.4 VEHICLE SELECTION RANKING

The vehicle selection function in our information systems provides a quick and easy way to identify spare parts for a certain vehicle. The diagram gives an overview of the most selected car manufacturers from **2022 – 2024**.

From **2022 to 2024**, the vehicle selection trends in our information systems have shown notable s hifts among the most chosen car manufacturers. **Volkswagen (VW) has consistently remained the top-selected brand**, though its share has slightly declined from **21,68% in 2022** to **21,14% in 2024**.

Mercedes-Benz has seen a steady increase in selection, rising from **9,97%** to **10,05%**. **Opel has remained relatively stable**, fluctuating around **8,77% – 8,83%**.
Ford and BMW have shown minor variations, with **Ford increasing slightly from 7,29% to 7,52%** and **BMW decreasing from 6,86% to 6,70%**.
Audi has experienced a slight decline from **6,75%** to **6,54%**. **Renault and Skoda have maintained nearly constant shares**, while **Fiat and Peugeot have recorded small fluctuations. Others has consistently grown**, increasing from **24,35% to 24,93%**, reflecting a broader diversification in selected vehicle brands.

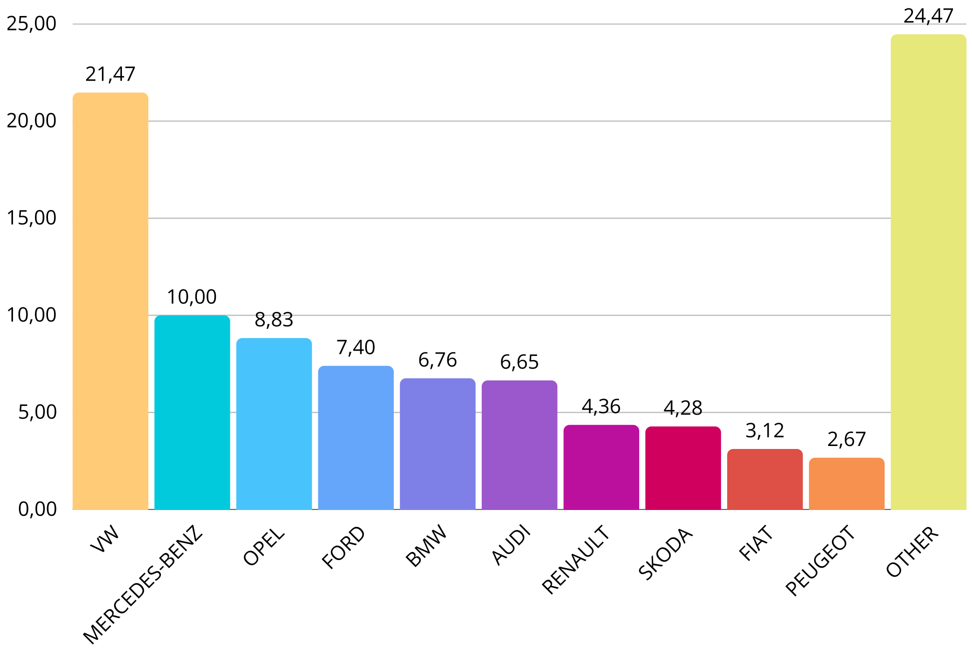
2022



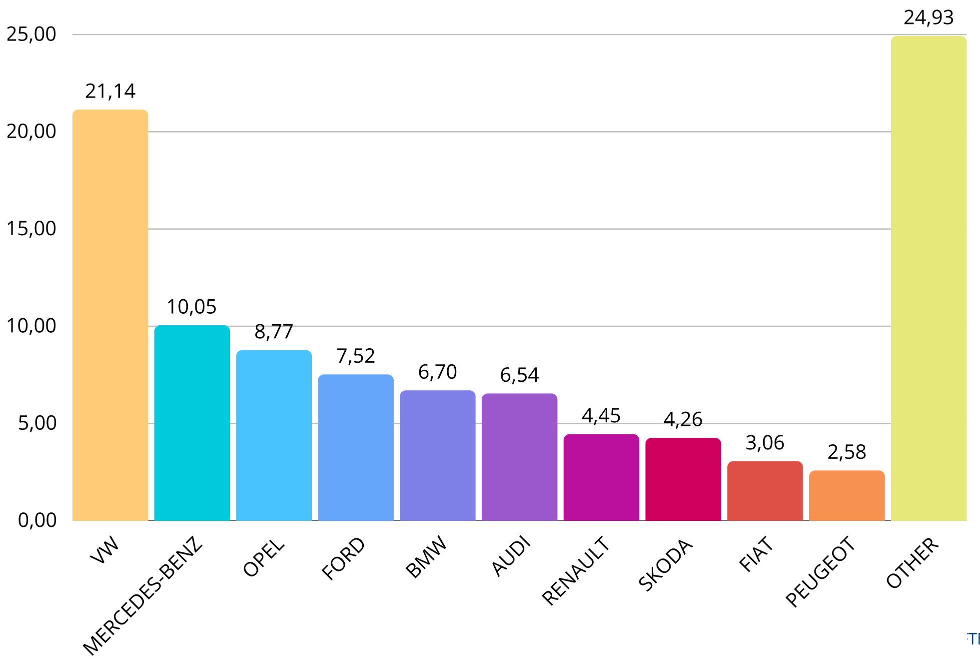
1.

1.4 VEHICLE SELECTION RANKING

2023

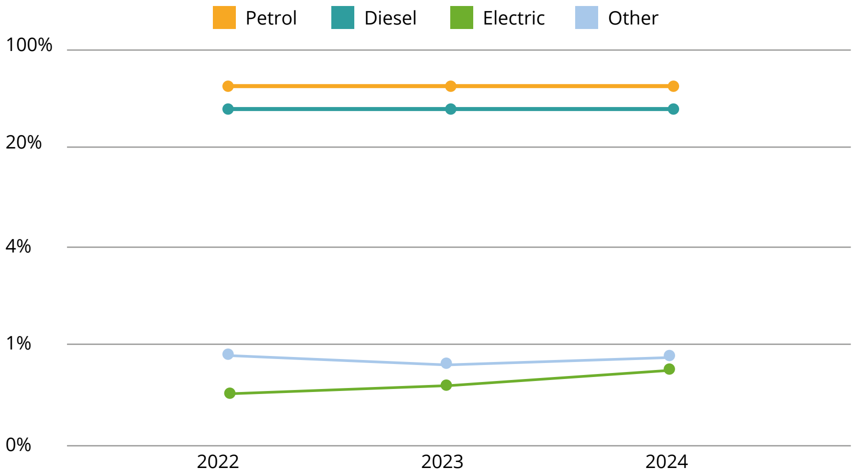


2024



2.

// Electric Mobility: DACH 2022 – 2024



The graph illustrates the development of electric vehicles (EVs) in the DACH region from 2022 to 2024 in comparison to petrol and diesel engines (and others). Our data shows that **petrol and diesel vehicles have maintained a dominant market share**, remaining relatively stable over the years. However, **EVs** and other alternative fuel vehicles have **shown a gradual increase**, with a **slight upward** trend in adoption. Although their market share is still significantly lower than conventional fuel types, the steady rise in electric vehicles indicates a growing shift toward sustainable mobility.

FUEL TYPE	2022	2023	2024
PETROL	54,25%	54,19%	54,54%
DIESEL	44,67%	44,79%	44,26%
ELECTRIC	0,38%	0,43%	0,53%
OTHER	0,70%	0,59%	0,66%

3.

Market Indicator

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

MARKET INDICATOR

Below you will find an evaluation of specific product groups, sorted by Top Brand by Product Group. First the development of the last few years, then the evaluation of the data quality with our new evaluation system, the Market Indicator.

What's the Market Indicator?
Our Market Indicator evaluates the data and parts coverage quality of parts manufacturers. Using a scoring system developed by us, a ranking is created based on the market-relevant data quality and quantity, which indicates how well the data is maintained.

A high score indicates excellent data linkage and quality, while a low score indicates gaps in the product range or insufficient data work. The analysis is carried out according to product groups and manufacturers. The score is calculated from two components. On the one hand from the references to vehicles, and on the other from the references to original or competitor numbers.

How we calculate the Market Indicator
Imagine a mechanic in a workshop is looking for spare parts in his workshop catalog. He has two options to look for the parts he needs.

1. Vehicle Search:
Mechanics often select a specific car model, like a VW Golf IV 1.4 or an Audi A4 B4 1.9 TDI, and then look for parts that fit that car.

2. Article Search:
Sometimes, mechanics search for parts using a specific parts number, like „1K0615601AB“ or „2Q0615601H“.

Every time the mechanic selects a part in his catalog, we count it. At the end of the year, we look at which parts were selected most often. We analyze this data by separating it into product groups and parts manufacturer.

Let's say 1.000.000 brake pads were put in baskets after vehicle searches:

- 100.000 selections for VW Golf get a market indicator of 10 (1.000,000 ÷ 100.000)
- 10.000 selections for an Audi A4 get a market indicator of 1

For article searches, let's say 2.000.000 brake pads were put in baskets:

- 150.000 selections after searching for „1K0615601AB“ get a market indicator of 7.5
- 80.000 selections after searching for „2Q0615601H“ get a market indicator of 4

Now, here's the important part: We check your vehicle linkage data and your article linkage data. If there is no brake pad data for this VW Golf, there is a 10% gap, which means your market indicator drops by 10. The more popular the missing part, the more market indicator-points you lose. This applies for article searches as well.

We provide support in optimizing the score in a targeted manner and improving data quality in the long term. The first two charts show the top 10 vehicle links at vehicle level and the top 10 referencing numbers by shopping basket items. The third chart shows the top ranking with the Market Indicator Score for the respective product group.

3.

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

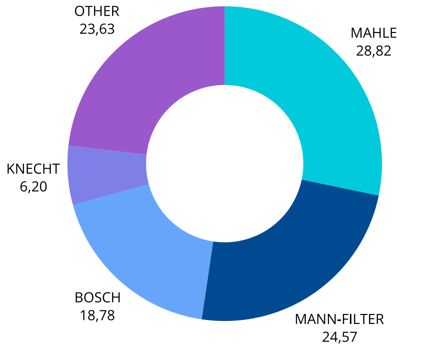
3.1 CABIN AIR FILTER

More than **50% of filters placed in the shopping basket were manufactured by Mahle and Mann-Filter from 2022 – 2024.**

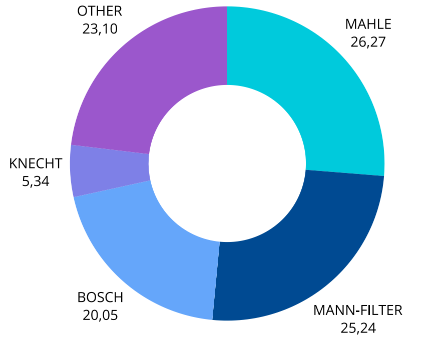
However, **Mahle lost its number one seat to Mann-Filter in 2024** with **Mann-Filter making significant gains over the last years while Mahle losing ground slightly every year.**

While **Bosch made good improvement, Knecht almost halved over the last four years.**

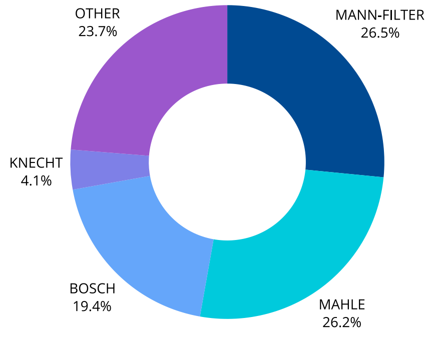
2022



2023



2024

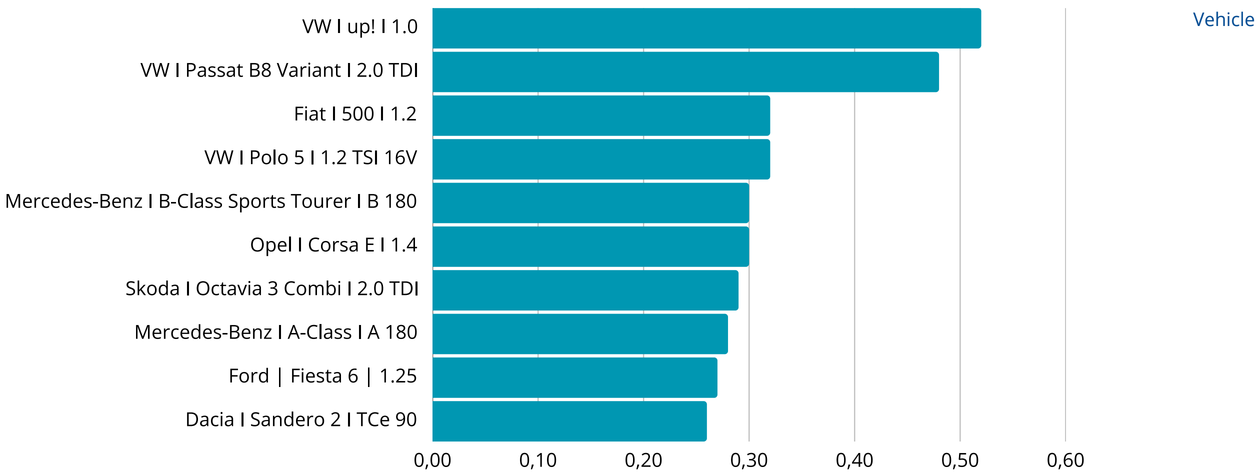


3.

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

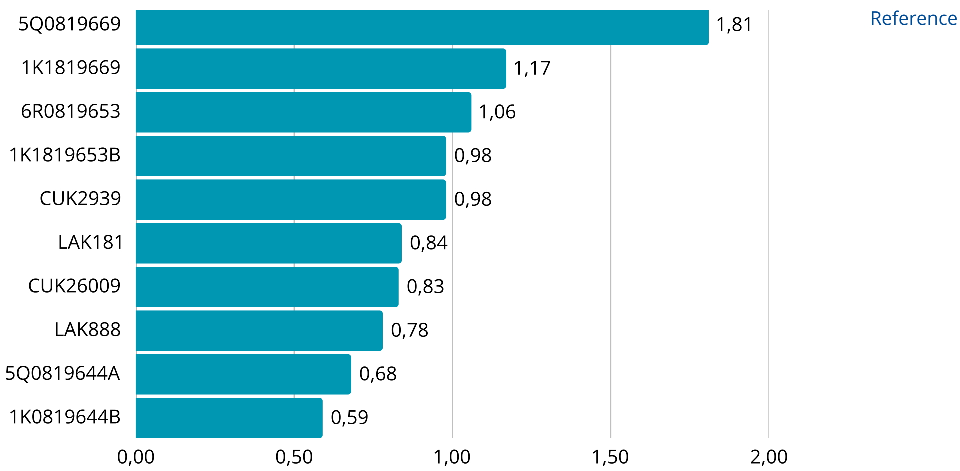
3.1.1 DEEP DIVE

TOP 10 VEHICLES 2022-2024



Basket Positions with selected Vehicle

TOP 10 REFERENCES 2024



Basket Positions after searching for Reference

3.

3.1.1 DEEP DIVE

BRANDS DATA QUALITY (TM MARKET INDICATOR) 02/25

BRAND	SCORE %
MANN-FILTER	95,43
BOSCH	94,55
WIX FILTERS	94,24
FILTRON	94,21
MAHLE	94,12
KNECHT	94,04
MAXGEAR	91,13
SIVENTO	89,47
OPTIMAL	88,60

The ninth place in the search terms is missing 9.961 referenced entries from the first place.
In the vehicles, 4.985 links are missing.

3.

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

3.2 BRAKE DISC

Over the years from 2022 to 2024, **ATE remained the dominant brand**, although its market share fluctuated slightly, peaking at **30,43% in 2022** before slightly declining to **28,85% in 2024**.

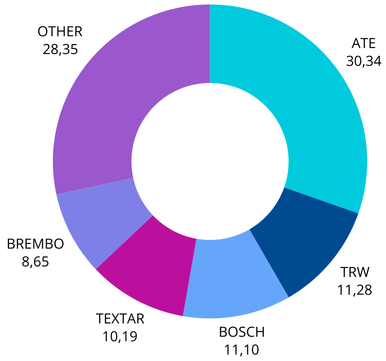
TRW showed steady growth, increasing its share from **11,28% in 2022** to **14,27% in 2024**, while **BOSCH also strengthened its position**, rising from **11,10%** to **12,75%** over the same period.

BREMBO also showed steady growth, rising from **8,65% in 2022** to **12,63% in 2024**. **TEXTAR, on the other hand, experienced a steady decline** from **10,19% in 2022** to **8,25% in 2023**, ultimately dropping out of the ranking in 2024 to be replaced by **OPTIMAL**, holding **6,25% in 2024.**

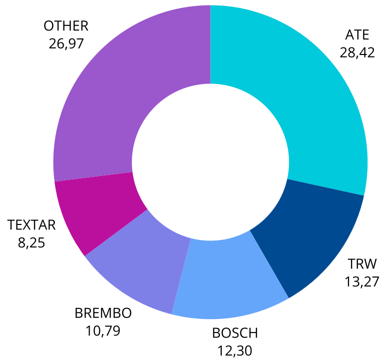
Others, which initially held the largest share at **28,35% in 2022**, gradually decreased to **25,25% in 2024**.

Overall, while **ATE continued to lead the market, TRW and BOSCH and BREMBO gained momentum**, whereas **TEXTAR and the Others lost ground**, with **TEXTAR being replaced by OPTIMAL in 2024.**

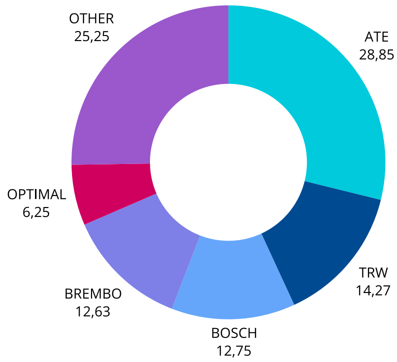
2022



2023



2024

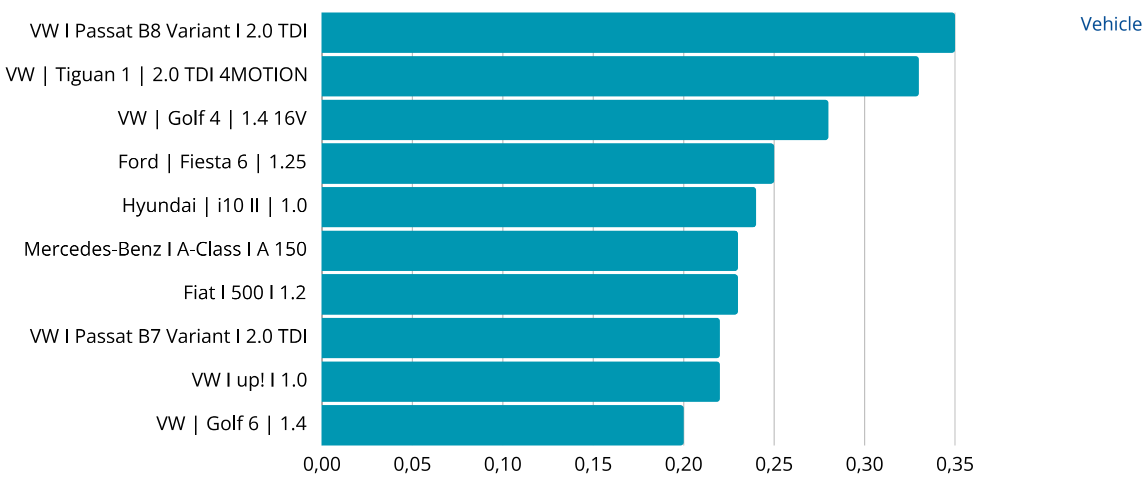


3.

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

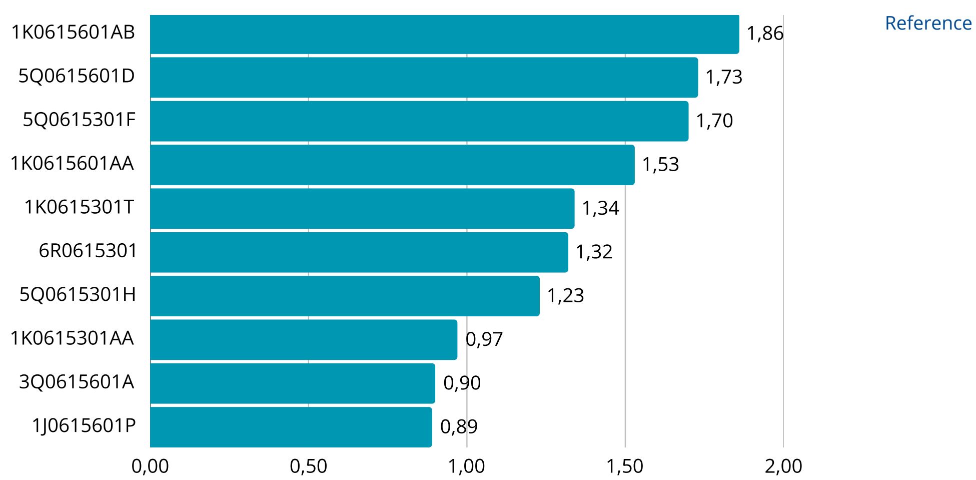
3.2.1 DEEP DIVE

TOP 10 VEHICLES 2022-2024



Basket Positions with selected Vehicle

TOP 10 REFERENCES 2024



Basket Positions after searching for Reference

3.

3.2.1 DEEP DIVE

BRANDS DATA QUALITY (TM MARKET INDICATOR) 02/25

BRAND	SCORE %
TEXTAR	94,86
FERODO	93,10
BREMBO	93,04
BOSCH	91,69
ATE	90,62
ZIMMERMANN	89,80
TRW	89,80
OPTIMAL	89,48
QUARO	88,80
MAXGEAR	87,32

The 10th position in search terms lacks 11.144 referenced entries compared to the first position.
In the vehicles category, 1.620 vehicles are missing.

3.

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

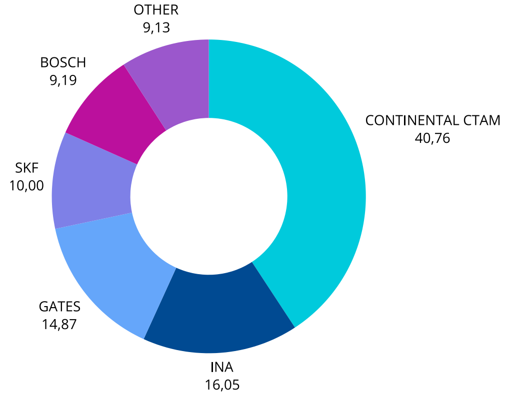
3.3 WATER PUMP & TIMING BELT KIT

From 2022 to 2024, the market share of **CONTINENTAL CTAM** steadily decreased from **40,76% in 2022** to **34,14% in 2024**, showing a continuous decline. **INA**, on the other hand, gained a significant increase, rising from **16,05% in 2022** to **25,85% in 2024**, making it the strongest growing competitor.

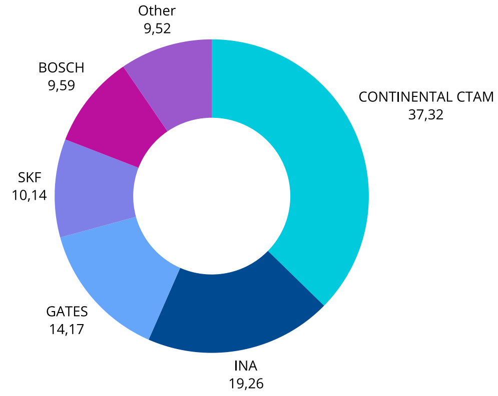
GATES experienced minor fluctuations but remained relatively stable, moving from **14,87% in 2022** to **12,62% in 2024**. **SKF** and **BOSCH** maintained relatively constant market shares, each fluctuating around **9 - 10%** over the years. The **Others** also remained stable, with minor variations between **9% and 11%.**

Overall, while **CONTINENTAL CTAM** lost market share, **INA** saw strong growth, positioning itself as a more dominant player in the market.

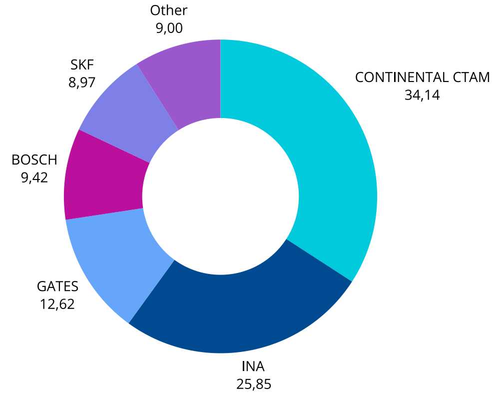
2022



2023



2024

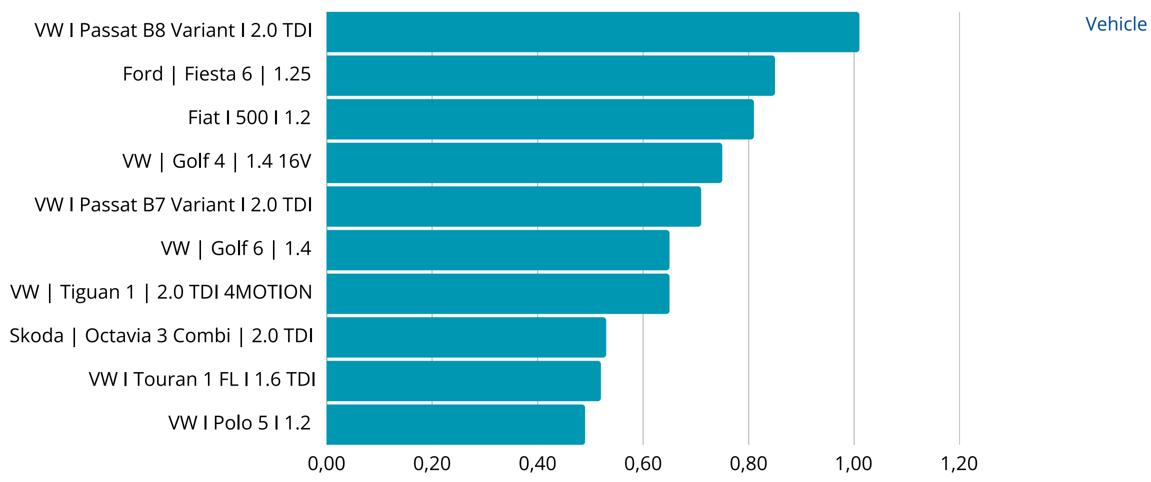


3.

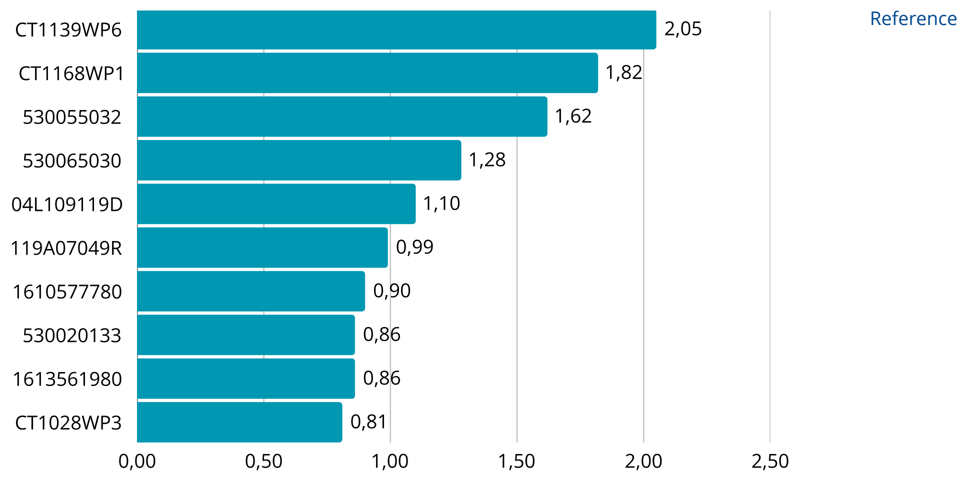
// TOP BRANDS BY PRODUCT GROUPS – DACH 2024

3.2.1 DEEP DIVE

TOP 10 VEHICLES 2022-2024



TOP 10 REFERENCES 2024



3.

3.3.1 DEEP DIVE

BRANDS DATA QUALITY (TM MARKET INDICATOR) 02/25

BRAND	SCORE %
INA	91,51
METELLI	91,33
HEPU	91,06
SKF	91,01
GK	89,14
GATES	87,55
CONTINENTAL CTAM	85,00
SNR	80,17
BOSCH	76,79
DAYCO	76,16

The 10th position in the search terms is missing 1.442 referenced entries compared to the first position. In the vehicle category, 1.653 links are absent.

3.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2024

3.4 CONDENSER AIR CONDITIONING

From 2022 to 2024, significant shifts occurred within the product group.

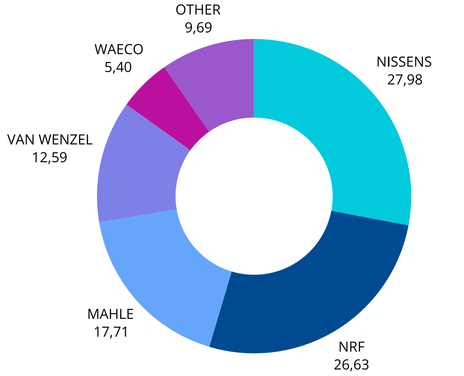
By 2022, **Nissens** took the lead with **27,98%**, surpassing **NRF (26,63%)**. **Mahle** increased to **17,71%**, while **Van Wezel (12,59%), Waeco (5.4%)** and **Others (9,69%)** saw slight decreases.

In 2023, **Nissens** expanded its lead to **34,01%**, with **NRF** declining to **23,69%**. **Mahle** grew to **18,53%**, while **Van Wezel (10,99%), Waeco (4,93%)** and **Others (7,85%)** continued their downward trend.

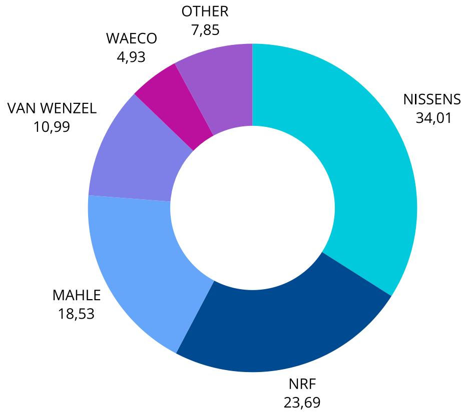
By 2024, **Nissens** further strengthened its dominance at **38,55%**, while **NRF** slightly decreased to **23,56%**. **Mahle** maintained a stable position at **18,69%**. **Van Wezel (8,79%), Waeco (3,63%)** and **Others (6,78%)** saw further declines.

Overall, **Nissens** emerged as the clear leader, with **NRF** losing ground over time. **Mahle** showed moderate growth, while **Van Wezel, Waeco and Others** consistently declined in market share

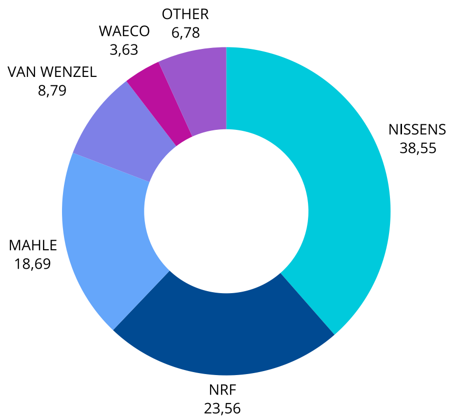
2022



2023



2024

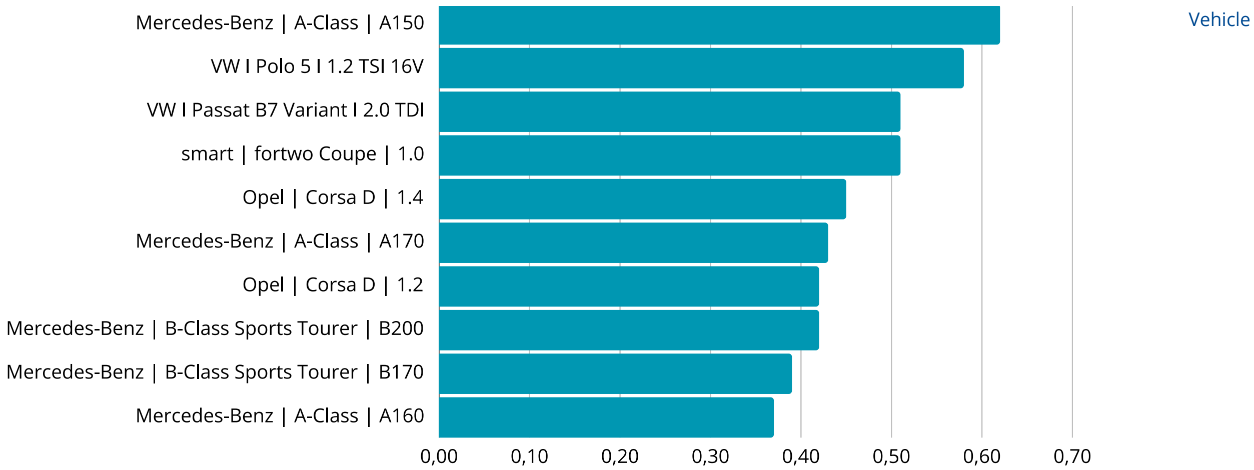


3.

// TOP BRANDS BY PRODUCT GROUPS: DACH 2022 – 2024

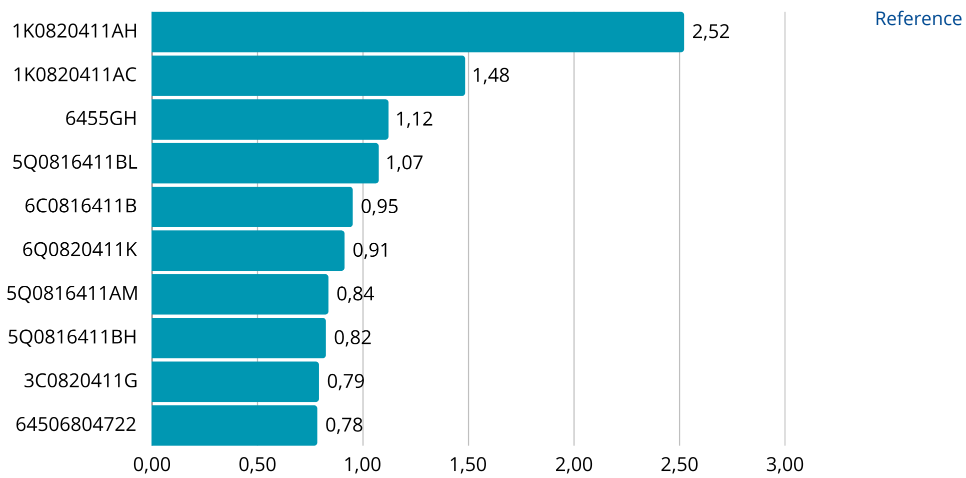
3.4.1 DEEP DIVE

TOP 10 VEHICLES 2022-2024



Basket Positions with selected Vehicle

TOP 10 REFERENCES 2024



Basket Positions after searching for Reference

3.

3.4.1 DEEP DIVE

BRANDS DATA QUALITY (TM MARKET INDICATOR) 02/25

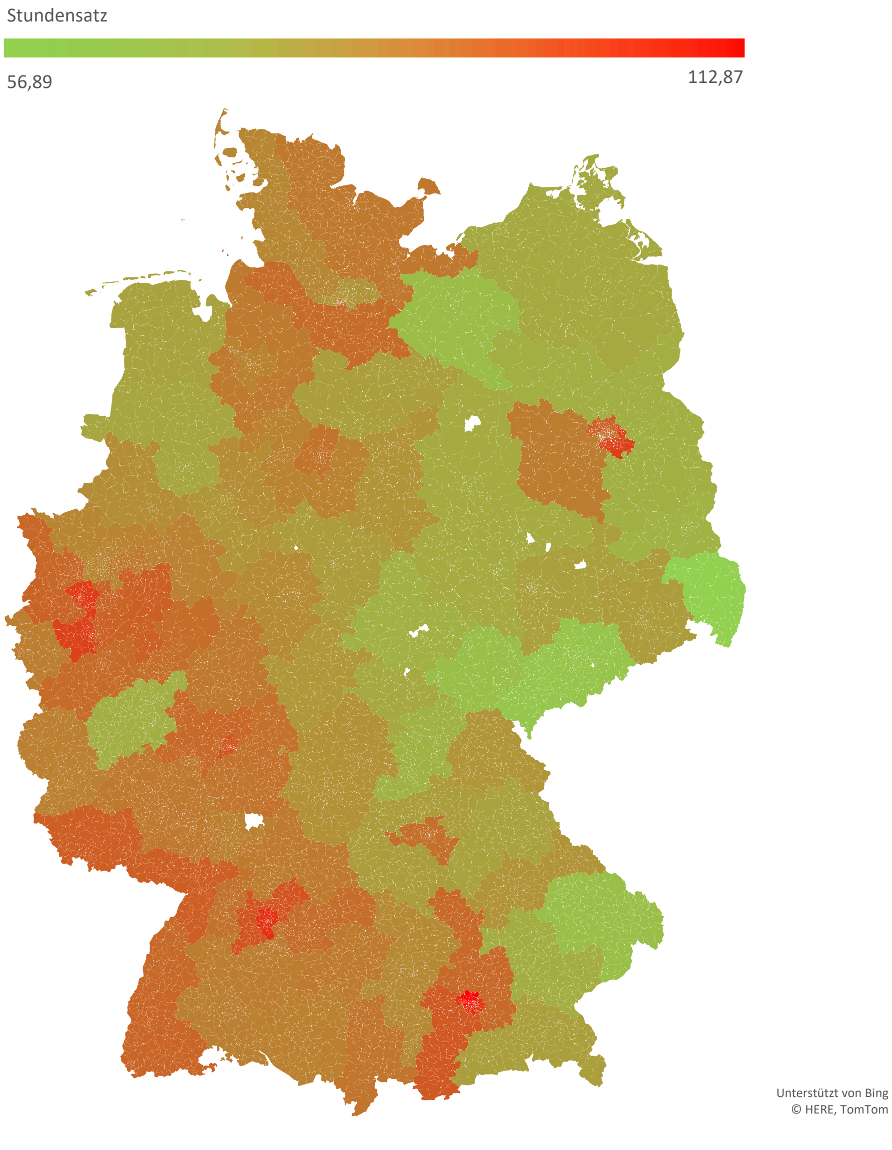
BRAND	MARKET INDICAOR
NRF	92,27
NISSENS	91,79
MAHLE	90,69
VALEO	88,50
MAXGEAR	88,48
VAN WENZEL	87,47
AKS DASIS	85,69
DENSO	80,40
WAECO	72,70

The ninth position in the search terms falls short by 3.030 referenced entries compared to the first position. In the vehicle category, 3.132 links are missing.

3.

// TMWA

TMWA enables detailed evaluations of hourly rates in independent workshops throughout Germany. The hourly rates shown here are based on an evaluation by two-digit zip code areas and are derived from data from several thousand independent workshops. Only work in the field of mechanics was taken into account. The average hourly rate is 77,62 Euros. Repairs are most expensive in Munich.



// INTERESTED IN MORE DETAILED DATA?

If you are interested in more detailed data, do not hesitate to contact us. We offer individual data packages, suiting your special requirements. These data packages include the following:

BASKET ITEMS ANALYSIS

Basket items analysis depending on the generic articles you wish. This analysis includes the data supplier as well as the specific article number and the amount of basket items. We can provide you this data on a quarterly basis.

ARTICLE SEARCH ANALYSIS

Interested in the top searched article numbers? We can provide you with this information according to the generic article you wish. We can also analyze the top searched OE numbers for a given generic article.

VEHICLE SELECTION ANALYSIS

Do you want to know what type of vehicles are often selected in our catalogs? We can provide you with the manufacturer, model and Ktype, based on the number of vehicle selections. We can also provide you with the top vehicle selections per generic article.

// CONTACT

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